



PRICE

POVERTY REDUCTION BY INCREASING THE
COMPETITIVENESS OF ENTERPRISES

SECTOR GENDER ANALYSIS

July 31, 2008

This publication was produced for review by the United States Agency for International Development. It was prepared by SRGB for Chemonics International.

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Sector Gender analysis

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The author's views expressed in this publication do not necessarily reflect the views of the United States Agency for International Development or the United States Government.

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I. STUDY BACKGROUND

A. Introduction

This report presents a detailed analysis of gender constraints in the aquaculture (shrimp and fish), horticulture, and leather sectors of Bangladesh. As a policy, both the Government of Bangladesh and the U.S. Agency for International Development (USAID) are committed to gender integration, and USAID has made gender an essential, cross-cutting theme in its country strategy. In view of the above, USAID's Poverty Reduction by Increasing the Competitiveness of Enterprises (PRICE) project contracted a private consulting firm, SRGP, to conduct a systematic gender analyses for these sectors. Recommendations from this analysis will inform PRICE's work plan and assist the project in promoting economic and gender equity in project activities.

The objective of PRICE is to "increase sales, jobs, and investment throughout the aquaculture, horticulture, and leather value chains, with particular benefit to women, young adults, and small and medium enterprises." To achieve this objective, PRICE focuses on enhancing the competitiveness of Bangladeshi firms, products, and services in global markets while increasing opportunities for the poor to participate in and benefit from economic growth. PRICE proposes to accomplish the above by designing strategic sector-wide activities, facilitating sales transactions, and advocating for policy reform.

This report is organized into four sections. This section introduces the study, and sections II, III, and IV present sector-specific information.

B. Study Objectives

The main objective of this study is to identify and address constraints to the pro-poor growth of sales, jobs, and investment throughout the aquaculture, horticulture, and leather value chains. Specifically, the study:

- Assesses gender equity issues in the selected PRICE sectors
- Identifies interventions that promote both gender equity and sustainable sector growth
- Recommends ways to incorporate gender equity issues into future project interventions
- Recommends indicators to monitor gender equity in PRICE's performance monitoring plan

C. Methodology

The three sector studies presented in this report were prepared using secondary information from sector-related literature. Primary data from surveys and qualitative techniques such as focus group discussions and key informant interviews also were used in preparing the study.

C1. Study Areas

The studies were carried out in three pre-selected locations of Bangladesh. Primary data on shrimp and aquaculture was collected in the Satkhira district of Khulna

division, one of the main shrimp producing locations, and in the Trishal district of Mymensingh, a booming industrial fish area of Bangladesh. For the horticulture sector, data was collected from six districts: the Dhaka, Narshingdi, Gazipur, and Manikganj districts of Dhaka division, Rajshahi Sadar in Rajshahi division, and Jessore in Khulna division. Data on the leather sector were collected in both Dhaka and Gazipur.

C2. Sampling

For each sector study, selected sector specific respondents, institutions, and industries were surveyed. However, time limitations did not allow for scientific sampling techniques to be applied.

In studying the shrimp industry, 32 women working in different areas of the value chain were selected and interviewed using a survey questionnaire. Five focus group discussions and 11 key informant interviews supplemented information gathered from literature reviews and surveys. For the leather sector, 8 focus group discussions with 64 participants were conducted and 11 key informants were interviewed. For the horticulture sector, 8 focus group discussions and 21 in-depth interviews, and 2 key informant interviews were conducted.

C3. Scope of the Study

The scope of this study encompasses identification of key stakeholders in aquaculture, horticulture, and leather value chains; gender roles in the value chains; sex-disaggregated data for developing gender appropriate indicators; wage rates of the respondents in different nodes of value chain; gender disparity in labor and wages; gender-based violence; cultural barriers; legal support to combat gender-based violence; challenges and future prospects of women in the leather sector; and reduction of poverty.

II. SHRIMP AND AQUACULTURE SECTOR

A. Introduction

Shrimp plays an important role in the national economy of Bangladesh, ranking second in foreign exchange earnings. Only the garment industry earns more. The shrimp industry has been a major source of employment for the rural poor and vulnerable populations¹ in particular, women in coastal zones. Approximately 600,000 people, including a large segment of women, have been employed directly in shrimp farming. These workers support approximately 3.5 million dependents¹

Following the independence of Bangladesh in 1971, demand for shrimp in foreign markets soared. In response to this demand and the high price of shrimp, Bangladeshi firms began farming shrimp commercially. The government of Bangladesh undertook several initiatives to encourage development of the industry and to promote it. Consequently, shrimp farming in the coastal zones expanded rapidly, particularly in Satkhira, Khulna, Bagerhat, and Cox's Bazar, where suitable environments for shrimp farming¹ tidal inundation and saline water¹ exist.

B. Socio-Demographic Characteristics of Survey Respondents

Most respondents (62.5 percent) were 15 to 30 years old and were married (68.75 percent). However, a large segment of married female workers had been abandoned by their husbands. The majority of respondents had primary-level education and were employed in a variety of activities, including de-heading, peeling, and deveining shrimp for processing firms. None of the respondents had received any training related to their jobs, but more than 40 percent believed that training would be beneficial.

Income data from the shrimp sector presents a gloomy picture of respondents' financial condition. The monthly earnings of more than 53 percent ranged from Tk 2,001 to 3,000, and 25 percent earned Tk 1,000 to 2,000. Nearly 18 percent had incomes between Tk 3,001 to 4,000. Only 1 respondent reported an income above Tk 4,000. The majority of respondents (75 percent) spend their entire earnings to satisfy basic needs for themselves and their families. Despite equal productivity, there is a significant differential between the wages of male and female workers.

Nearly all workers surveyed (96 percent) were employed on a temporary basis and did not have any contractual agreement with their employers. Even those employed on a permanent basis did not have written contractual agreements. More than 56 percent of respondents stated that employers do not abide by the verbally agreed-upon terms and conditions of their employment.

In the shrimp industry, both male and female employees often face job-related health problems and female employees experience both physical and sexual abuse. Respondents reported some female workers engaging in consensual sex, either for pleasure or to earn extra income. Employers provide first aid to workers, but no other health care is provided.

¹ Sarah Gammage *et al.* A Pro-Poor Analysis of the Shrimp Sector in Bangladesh (Arlington, Virginia: Development & Training Services, Inc. (2003).

Female employees suggested different measures to improve their job conditions and work environment and to ensure their social protection. These include housing for employees working in processing plants and hatcheries, legal support to combat harassment by employers, child care, health care, gender-specific toilets, financial incentives, strict measures to stop physical and sexual abuse, workplace security, and arrangement for day-shift work for women with family responsibilities. Respondents believed these changes were possible but that they would require increased awareness among government officials and policy makers of the issues faced by female shrimp workers.

C. Study Findings

This study focuses on gendered value chain analysis² forward and backward linkages to explore the possibilities of maximizing returns for poor men and women working at different points in the value chain. In short, a gendered value chain analysis addresses power within the production and exchange relationships.²

C1. Gender Equality

The shrimp value chain is buyer-driven, and producers² particularly small producers² have little ability to influence the price at which they sell their product. Producers are frequently locked into contracts that limit the price they receive, and they often have minimal bargaining power.

In the last two decades, culture fisheries throughout Bangladesh have emerged as a major industrial sector. As with the shrimp sector, fish production plays an important role in rural employment and alleviation of poverty. Although inland open water is the major source of fish production in the country, culture fisheries are increasing sharply due to dissemination of adaptive technologies and effective extension services rendered both by the Directorate of Fisheries and nongovernmental organizations (NGOs) working in the field.

Like the shrimp sector, the fish sector is dominated by men, and the participation of women is negligible. Most of the women encountered by the survey were engaged in cooking tasks. According to hatchery owners, women are not physically fit to work in hatcheries because the work is too strenuous for them.

Inequalities in the shrimp sector can be addressed from both economic and social dimensions. From an economic standpoint, inequalities can be attributed to market power, monopolistic enterprises, indebtedness, and coercive contracting relationships. From a social standpoint, social norms, values, sanctions, and exclusion frequently affect an individual's ability to enter labor markets, acquire productive assets, invest in his own or another's human capital, and lend and borrow money. Often, such norms, values and sanctions are gendered-based. For example, in our study, respondents reported that women are generally barred from working in shrimp ponds because it is believed that their presence might pollute the shrimp fry.

² Gammage, page 2.

Female workers engaged in the shrimp industry are often considered flexible, temporary workers who can be hired to meet immediate production or processing needs and then let go. They are often required to work overtime inhumanely to meet production schedules directed by buyers or input availability. The terms and conditions of employment along the value chain reflect the inequalities in power and contracting at each node of the chain. Inequality in women's participation is visible not only in wages, but also in the segmented nature of labor markets that employ them and in the hours and working conditions. One female worker claimed to work for 14 to 16 hours a day and, in some cases, for 2 to 3 days at a time with little or no rest. According to this woman, ðowners earn millions of Taka on our labor, but they pay us on average Tk 1,200 to Tk 1,600 a month. We receive no overtime pay for our extra duties.ö

C2. Marketing Channels

Two kinds of shrimp production were observed throughout the coastal zone of Bangladesh; brackish water and sweet water shrimp. This study concerns brackish water shrimp. The traditional method of shrimp production is referred to as the pond, method. This method, which has been modified in response to the increased global demand for shrimp, and takes place in the low-lying, reclaimed areas.

To enhance shrimp production, traditional methods have been modified in ways that tend to be capital-intensive and more input-oriented.

Table 1 outlines the -shrimp and aquaculture value chains.

Table 1. The Shrimp and Fish Value Chains

Shrimp	Fish
Fry collection. Although not officially permitted, collecting shrimp fry is a livelihood for thousands throughout the coastal zones of Bangladesh. Approximately 90 percent of fry collectors are women and children. Approximately 35 percent of female workers in the shrimp value chain in Bangladesh earn their livelihood as fry catchers. ³	Brood fish traders/collectors: Brood fish traders are basically table fish farmers. Fish that is not sold as table fish is sold to hatcheries.
Hatcheries. Hatcheries provide controlled conditions for the breeding of mother shrimp, which owners obtain from farmers and marine fisherman. The involvement of women as hatchery owners or laborers is negligible. No female workers were reported in the hatcheries surveyed in the study area. Only 1.9 percent of the total female workforce in this sector in Bangladesh is represented by women. ⁴	Spawn traders. These traders collect spawn from rivers and other sources of water and sell them to hatcheries and nurseries.
Nurseries. In some instances, shrimp fry are placed in nurseries to adapt to the farm production environment before being delivered to farm owners. Female employment in nurseries is almost nonexistent.	Hatcheries. In Mymensingh, 77 private hatcheries produce fingerlings. Many hatchery owners apply advanced technical knowledge to produce high-quality fingerlings. Their technical skills and knowledge of hygienic practices are quite good.
	Nurseries. There are approximately 2,003 private nurseries in the greater Mymensingh area. Large nurseries tend to practice good cultivation techniques, including proper pond preparation, proper feeding, and maintenance of selling chambers. However, smaller nurseries lack many of these techniques. The survival rate of fingerlings in these smaller nurseries is low.

³ World Fish Center (WFC) ðShrimp Quality Support Project 2 ó Final Reportö Dhaka, Bangladesh, The World Fish Center (2007).

⁴ *ibid.*

Shrimp	Fish
Fry forias. <i>Forias</i> are intermediaries who purchase shrimp fry from collectors or hatcheries and sell them to other intermediaries. This sector is totally dominated by males, with little involvement by women.	Forias. As in the shrimp sector, <i>forias</i> play a key role as middleman in the fish sector.
Farming. Farmers produce different varieties of shrimp. Selection of species for cultivation depends on the market situation and is often influenced by the advance payment system through which the shrimp <i>forias</i> and wholesalers impose their preferences in response to price signals and market demand. In the farming phase, limited participation by women was observed: generally in resectioning pond boundaries or cooking.	Fingerling traders. These traders buy fingerlings from nurseries and sell them to farmers. Primitive transport methods result in low survival rates.
Feed mills. Some feed is imported from Thailand and Taiwan. However, respondents said that the high price of imported feed has increased preference for locally prepared feeds that lack the vital nutrients required to promote growth of shrimp in reclaimed pond areas.	Fish farmers. More than 15,000 fish farmers operate in greater Mymensingh. At least 30 of these farmers use proper fish cultivation methods (particularly in preparing ponds), but the others use more primitive processes.
Wholesalers. These owners of wholesale depots serve as intermediaries between <i>forias</i> and owners of hatcheries and shrimp farms. This node of the shrimp value chain is male-dominated. In some depots, a few females work as shrimp cleaners, and participation of women as depot holders (1.5 percent) was traced. ⁵	Wholesalers. Wholesalers, act as commission agents. Farmers bring their fish to the markets, and the wholesalers provide storage facilities and receive commissions from retailers for their services.
Shrimp commission agents. Shrimp commission agents are medium- to large-sized enterprises that sell shrimp to exporters. There is no evidence of women's participation in this area of the value chain.	
Transportation. In the shrimp value chain, transportation plays a vital role. The greatest transportation costs are absorbed by wholesalers, processors, and exporters. This area of the value chain is managed exclusively by males.	
Processing and processors/exporters. 130 shrimp processing plants currently operate in Bangladesh. This is where the bulk of women participating in the value chain work. Of the total number of females in the shrimp sector workforce, 65 percent are employed by processing plants. ⁶	
Foreign buyers. Foreign buyers purchase shrimp either through commission agents or directly from the processors/exporters.	
Shrimp retailers. Shrimp retailers sell shrimp in the local markets for local consumption. A limited number of women sell shrimp in local markets.	Fish retailers. Retailers buy fish from wholesalers to sell to consumers. Fish cultivated in small ponds are typically consumed or sold in domestic markets.

⁵ WFC, *ibid.*

⁶ *ibid.*

D. Sector Recommendations

Area	Possible Mechanism for Implementation
Farm/Processing-level support	<ul style="list-style-type: none"> • Promote skills development and training workshops for women, such as provide training on nursing/ value of seeds • Lobby for the development of fair practices . establish maternity leave and equitable wages • Institutional developments: daycare centers at processor/factory level. This could be a subsidiary business for women in the area. • Technological developments: Introduce over wintering technology for value addition seeds, train women in particular; encourage poly-culture of fish, shrimp/prawn species by shifting farmers to modified traditional practices for increased yield.
Entrepreneurship development program	<ul style="list-style-type: none"> • Increase access to finance, information • Organize management, technical and financial, marketing training • Create linkage with various GO agencies and NGOs for supporting them in respect of credit supply and other issues • Organize female shrimp farming groups with proper entrepreneurship training. Lease out Government khas lands/ponds to the female groups. Provide legal support and technical training to the shrimp farmers/female groups on modern techniques of shrimp farming. • Provide support to the females to develop cottage based small feed mills through forming female associations
Social awareness of women's involvement in aquaculture	<ul style="list-style-type: none"> • Determine the appropriate media and materials for proper awareness outreach program • Develop campaign implementation procedure • Involve and assist government with the formation of an independent body to look after the brackish water shrimp culture to evaluate problems and prospects of shrimp farming and to improve the women's working conditions in the shrimp value chain. This body may be formed taking representatives from Department of Fisheries, local administration, women workers, civil society members and owners of ghers and processing industries. This body should be responsible for developing guidelines and protocols to govern shrimp aquaculture covering all aspects of shrimp farming. If proven successful, these guidelines could be introduced as regulation and ordinances through legislation. • Promote ethical and fair trading initiatives through training on corporate social responsibility to the local stakeholders to improve corporate codes of practice and congenial working atmosphere for the workers especially female workers.
Overall Sector Support	<ul style="list-style-type: none"> • Campaign for overall employment conditions for women including: enforcement of safety standards, equitable wages, employment benefits for women, full time employment of women, as well as for the provision of maternity leave • Enforcement of HACCP regulations at processing plants with special attention to women employees • Design outreach education techniques such as cartoons, audio visual materials, dramatization as well as workshop to educate women with best practices and labor laws • Advocate family farming integration to involve more women with aquaculture and agriculture • Liaise with various GO agencies and NGOs to support farmers • Advocate family farming integration to involve more women with aquaculture and agriculture • Encourage poly-culture of fish, shrimp/prawn species by shifting farmers to modified traditional practices for increased yield. Provide training to the farmers, particularly to the females to diversify production in small farms.

E. Possible Indicators to Reflect Success in Gender Equity

Tentative indicators for the success in gender equity are:

- Number of women receiving permanent employment contracts
- Number of women receiving access to finance

F. Key Project Partners

	Partner	Possible Area of Cooperation
Government	Government of Bangladesh	<ul style="list-style-type: none">• Enact laws• Disburse government-held land• Form appropriate authority to monitor the shrimp sector• Promote exports• Enforce laws• Provide extension services
Public Sector	USAID/PRICE	<ul style="list-style-type: none">• Create investment funds for the shrimp sector• Frame policy for higher production• Ensure appropriate measures and supports for ensuring the interest of women working in different nodes of the sector• Support participatory analysis of optimal land management
Government	Local administration	<ul style="list-style-type: none">• Enforce law and order• Secure land tenure regimes and titles• Play a role in diversified farming
Public Resource	NGOs/civil society	<ul style="list-style-type: none">• Train farmers in improved shrimp cultivation• Provide stakeholders with training in corporate social responsibility• Make loans with easy terms to small and poor farmers and women working in the sector

F. Sector Conclusion

Shrimp and fish are important sectors for Bangladesh's economy. Women working in these sectors have no social security, are faced with physical and sexual harassment; suffer from malnutrition and chronic, job-related health problems; have no job security; and experience other issues. Meaningful change in the aquaculture value chain will require upgrading infrastructure, improving market channels, expanding markets, ensuring compliance with existing regulations, and strengthening quality requirements. Sustainable change will ultimately require improvements in the terms and conditions of employment for workers and small producers.

III. LEATHER PRODUCTS SECTOR

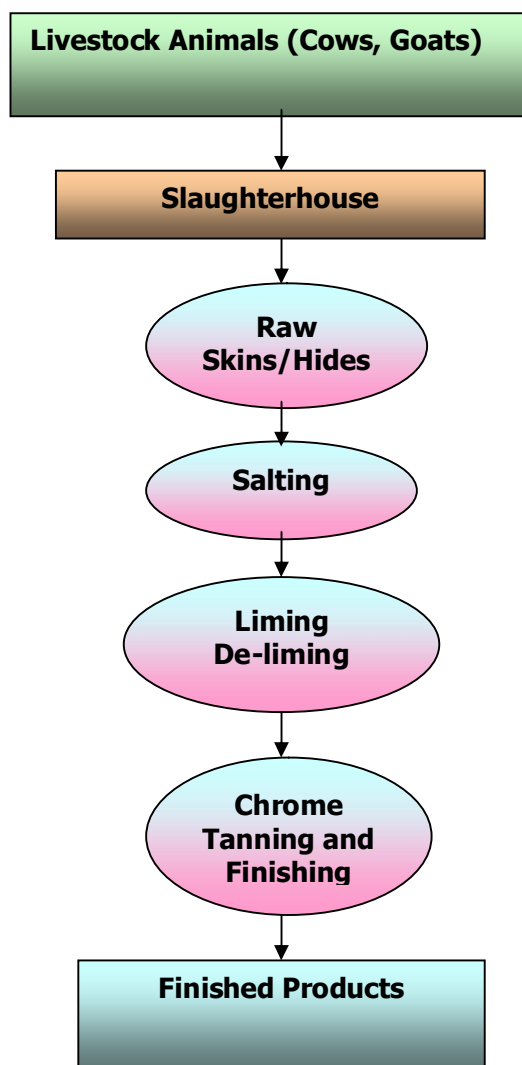
A. Introduction

Leather is a traditional export item for Bangladesh. Hides and skins produced in the country enjoy a good reputation for their quality worldwide. However, Bangladesh has had little success in realizing potential export earnings from the sector. The business community and trade experts believe that export earnings from the sector can be increased substantially if higher quality leather and leather products are produced. Bangladesh has adopted an export-led growth strategy for its economic development. Therefore, it is imperative that the country maintain sustained export growth to accelerate development and alleviation of poverty.

B. Leather Production Process

The production of leather involves a range of activities, beginning with the collection of raw hides from slaughterhouses throughout the country. Leather production involves salting, liming, de-liming, chrome tanning, and finishing (Figure 1).

Figure 1. Leather Production Process



C. Study Findings

PRICE is working to address constraints to the sustainable, pro-poor growth of sales, jobs, and investment throughout the leather value chain in. The project is committed to USAID's strategy of making gender an essential crosscutting theme in designing and implementing interventions, improving the competitiveness of value chains, and developing project indicators for measuring impact. This study looks at the leather sector through a gender lens to analyze the role of women throughout the value chain.

Leather processing work is heavy and hazardous. Therefore, females have historically had minimal involvement in the profession. However, the participation of women in leather processing has gradually increased due to poverty rates throughout the country. Of the total labor force in leather, only 10 percent are involved at the processing stage. At Apex footwear in Gazipur, 70 percent of the company's female workers are involved in the production of footwear.

The following findings are based on analysis conducted in the Hazaribag tannery area.

C1. General Treatment of Workers

Social Security. Social security is a basic human right; however social security measures to protect the health of workers do not address inequities faced by women working in tanneries. This is mainly because female workers constitute a small portion of the total number of tannery workers. The government offers a number of social security benefits, including pension, provident fund, gratuity benefits, benevolent fund, and maternity leave. These benefits are not available to workers engaged in temporary work. In the leather sector, many employees have had temporary status for as long as 10 to 15 years. In the case of female employees, the situation is worse. In spite of similar tenure, male employees often become permanent employees much sooner than their female counterparts. As a result, there is a wide gender gap in accessing social security benefits.

Health and safety issues. Health services in tanneries are nonexistent, and no health care professionals are present in the tannery despite the inherent health risks associated with the work.

Workers suffer from a variety of health problems, including skin diseases, diarrhea, jaundice, tuberculosis, and others. Residential areas close to tanneries are susceptible to environmental problems, and residents near the Hazaribag tannery are subject to higher mortality in comparison to those living 2 to 3 kilometers away from the tannery.⁷

Tannery workers often suffer work-related injuries. Accidents are not uncommon; many workers have lost their hands or been burned with chemicals. Compensation is not provided to injured employees.

In the tannery factory, we observed no provision of pure drinking water.

⁷ Haque, A. K. Enamul, Department of Economics - Human Health and Human Welfare costs of Environmental Pollution from the Tanning Industry in Dhaka- An EIA Study (North South University and others, (1997).

C2. Treatment of Male and Female Workers

General gender issues. Findings reveal that tannery owners are not gender-sensitive. In spite of the union's repeated requests for equal wages, owners pay little attention because female labor is inexpensive and readily available due to high poverty rates among female populations.

Wage discrimination. In Hazaribag-area tanneries, female workers receive less compensation than their male counterparts. Although this discrimination is well-known, women accept it because they see few income alternatives. Male employees have empathy for the women and often raise the issue in union meetings and with tannery owners. The workers' union expressed optimism that wage discrimination will be solved in the near future.

Social Stigma and Discrimination against female workers. The dignity of women is not always honored in the tanneries. Women are often subject to harassment and harsh treatment by male supervisors and counterparts. This, compounded with the social stigma of women working in the leather industry, makes their working environment exceptionally difficult.

The government of Bangladesh has introduced a policy that allows 120 days of maternity leave in all public-sector enterprises. Because tanneries are private enterprises, this law does not apply, and these benefits are not extended to employees.

Factory Rules 1979 mandates that crèches must be provided in every factory where female workers are employed. The observed facility did not have a crèche.

Factory regulations specify separate latrines for male and female workers, with a latrine for each 25 workers of each gender. This is to ensure the security of workers, particularly female workers. Only one toilet for female workers was observed in each tannery; the number of toilets for men was also insufficient.

The Hazaribag Tannery Workers' Union actively attempts to ensure workers' rights and minimize wage discrimination. Approximately 5,000 workers are members of this union. An executive committee of 25 members represents a number of tanneries. There are no female members of the executive body. However, 700 female workers are members of the union. Although the union serves as the best protection against discrimination, female union members tend to be passive participants, and male members often raise their voices on women's behalf.

C3. Treatment of Permanent and Temporary Workers

Prevalence of temporary employment status. All workers are hired on a temporary basis and there is no clear process to become a permanent employee. Temporary workers are not entitled to benefits. Most female workers maintain temporary employee status for long periods of time.

Permanent workers receive benefits such as gratuities, provident fund, medical and vacation leave, and bonuses. However, there are no rules or clear pathways to

becoming a permanent worker. Therefore, many workers remain temporary employees for long periods of time and may never achieve permanent status. As temporary employees, workers receive fixed wages that range from Tk 50 to Tk 65 per day, and they are not entitled to any of the benefits extended to permanent employees.

Temporary workers are not entitled to an accommodation allowance.

C4. Training

Lack of formal training. Tannery workers lack formal training and often learn through trial and error. The lack of training opportunities and trained personnel presents a major constraint to efficiency improvement in the sector. Skinning is generally done using basic methods that cause deterioration in the quality, size, and shape of the leather. As a consequence, local leathers are offered at lower prices in the international market, causing a loss in foreign exchange earnings.

In Bangladesh, the participation of women in the leather sector is culturally taboo. Focus group discussions of female students at the College of Leather Technology reveal that most female students entered the college over the objections of their parents.

Table 2 reveals minimal involvement of women in the leather sector. An unfavorable working environment combined with a lack of professional opportunities for female leather technologists prevents women from entering the tannery industry in larger numbers.

Table 2. Sex Desegregated Data: Gender Gap Among Trained Tannery Workers

Sl. No.	Position in Leather Sector	Male	Female	Total	% Female
1	Number of tannery workers	18,000	2,000	20,000	10.00
2	Members of workers union	5,000	700	5,700	12.28
3	Members of workers union executive committee	25	0	25	0.00
4	Students of the College of Leather Technology	938	100	1,038	9.63
5	Members of the Leather Goods and Footwear Association	126	1	127	.79

C5. An Exception to the Norm

Apex Adelchi Footwear Ltd. (Shafipur, Gazipur) strives to maintain a gender-sensitive environment. Seventy percent of Apex Adelchi employees are female, and wage rates for women are equivalent to those of their male counterparts. The company provides a daycare center, a medical center, and good toilet facilities for all employees. Jobs become permanent after employees complete a three-month training program, and the minimum monthly wage rate is Tk 2,000. Apex Adelchi provides a provident fund, gratuity, and paid leave to all employees; women are entitled to maternity leave. Environmental hazards are minimized because waste materials are purified and handled responsibly. Apex Adelchi serves as a model for responsible business practices in the leather sector.

D. Sector Recommendations

Area	Possible Mechanism for Implementation
Production level support	<ul style="list-style-type: none"> Hire industry trainers to improve skills of women workers in the Hazaribag tannery Create a module for skills development and training workshops for women and train professors at leather colleges Provide technical training to workers to improve stitching and sewing in footwear and leather products sector. Training should aim to improve quality to international standards with women as the main beneficiary. Train women on leather processing and skinning
Employee support program	<ul style="list-style-type: none"> Skills development program Develop temporary housing facilities to help increase mobility of labor for women working in tanneries. Encourage the establishment of healthcare facilities as it is required frequently for tannery workers with emergency care and follow-up treatment.
Entrepreneurship development program	<ul style="list-style-type: none"> Organize management, technical and financial training, assist with the development a franchise mobile training program Increase access to finance for women and women associations, information through liaising with banks who already provide to SMEs
Social awareness development program for women's involvement in leather industry	<ul style="list-style-type: none"> Determine the appropriate media and materials for proper awareness outreach proven Provide awareness training/campaigns on gender issues, the need for gender sensitivity. Aim these campaigns towards tannery owners and managers need to increase awareness of gender issues. Develop workshops to build awareness on existing labor laws, factory rules, and National policy for Women Advancement (NPWA) must be strictly implemented and monitored. Create advocacy program for the following: equitable employment benefits for women, maternity leave benefit, the establish daycare centers for women, health facilities for women, toilet facilities for women. Advocating for all these benefits will ensure the employment of women and their lower high turnover rate.
Overall Sector Support	<ul style="list-style-type: none"> Encourage the elimination of wage gaps and enforcement of equitable work hours, wage compensation and leave for female employees through campaigns.

E. Possible Indicators to Reflect Success in Gender Equity

Tentative indicators for the success in gender equity are:

- Number of women participating in training/skills development programs in stitching and sewing
- Number of women entrepreneurs receiving access to finance
- Equal wages for male and female workers
- Enforcement of a uniform service rule for tannery workers
- Day care centers provided

F. Key Gender Equity Project Partners

Sector	Organization	Expected Role
Public Sector	BRAC Proshika ILO, Bangladesh College of Leather Technology	Training and capacity building, gender training Training Training on labor laws Training
	Marie Stopes Clinic	Health care services

	German Association of Technical Cooperation International Trade Centre Bangladesh Leather Service Centre Bangladesh Finished Leather & Leather Goods Exporters' Association Bangladesh Export Promotion Bureau	Improve the quality of finishing, dyeing and designing of leather products Provide database of information on 63 leather firms and leather products Improve product quality Increase exports of leather products Organize leather goods fair Provide orientation on the quality of leather products Boost trade Increase exports of leather products
Private Sector		Share expertise for training and entrepreneurship

G. Sector Conclusion

Sector Conclusion

As the leather industry grows and the potential for exporting leather products promise massive export earnings, Bangladesh must develop the sector to a competitive international standard. Women play a vital role in this development. As global consumers become increasingly vigilant about the labor conditions in countries such as Bangladesh, the leather industry must make changes to improve the working conditions for women. Social taboos and sexual harassment, as well as poor production facilities are all a hindrance to increasing the participation of women in leather production. Women are not treated as equals, they are not given permanent employment and even when they are employed, the lack of daycare facilities and employment benefits such as maternity leave makes working in the sector extremely difficult. Sustainable development must include comprehensive skills development throughout the sector as well as the development of facilities to assist women to increase their productivity and mobility of labor.

IV. HORTICULTURE SECTOR

A. Introduction

The empowerment of women is an important concern in Bangladesh's horticultural sector. This section identifies gender constraints prevalent in the horticulture value chain and makes recommendations that will inform PRICE's work plan and assist the project to address the constraints and promote gender equity in project activities.

B. Gender Analysis on Horticulture

Based on the study's findings, significant participation of women was found in specific nodes of the flower, fruit, vegetable, and spice subsectors (Table 3).

Table 3. Participation of Women in Horticulture Sector Nodes

Product	Significant Nodes for Women's Participation	Product	Significant Nodes for Women's Participation
Flowers	Nurseries	Vegetables	Nurseries
	Farming		Farming
	Marketing and distribution		Processing of green vegetables
	Processing		Marketing and distribution
Fruit	Nurseries		Processing for preservation
	Farming	Spices	Farming
	Processing of fresh fruits		Marketing and distribution
	Marketing and distribution		Processing
	Processing for preservation	Seeds, pesticides and irrigation	No significant participation

B1. Involvement of Women

As in the agriculture sector in general, the formal participation of women in horticulture is somewhat limited. However, women play multiple informal roles in the value chain. Table 4 provides a description of women's involvement in horticulture at various levels of the value chain.

Table 4. Women's Involvement in the Horticulture Value Chain

Level	Employment Situation
Family (gardening)	<p>Women lead most horticulture activities at the family level (home gardening, kitchen gardening, etc.). Besides production, women have significant involvement in drying and processing horticultural products for family consumption. Some have also developed the capacity to market these products for local consumption. Women's role in income generation and employment is completely overshadowed by their domestic responsibilities.</p> <p>During interviews with rural families, many respondents of both genders recognized women's involvement in horticulture but did not view it as an employment opportunity.</p>
Farming	<p>There are considerable variations in the degree of women's participation in farming. In poorer communities, women contribute significantly to farming activities. However, their role is substantially less in higher-income communities. Few women outside the Chittagong hill tracts and other tribal areas are engaged in field crop production at the farmer level. Because women are often deprived of land ownership, few are considered owners of farms. Accordingly, although the role of women as farmers is insignificant on the surface, they play major roles behind the scenes in cleaning, grading, husking, drying, and packaging</p>

Level	Employment Situation
	horticultural products.
Entrepreneurship	Because women in Bangladesh are often deprived of fundamental rights and restricted by a number of social and religious taboos, their involvement as horticulture entrepreneurs is limited at best. However, in rural settings, it is common for poor women to produce and sell horticultural products. These women are sometimes supported by NGOs or donor projects.
Employment (processing and packaging)	Because few large-scale horticulture firms exist, opportunities for women to work in this area are limited. This study found that those women employed in horticulture factories are mostly engaged in processing and packaging products. Still, the scope of women's participation at the factory level is increasing in the horticultural sector.

B2. Gender, Wages, and Benefits

The study analyzed women's wages for various farm and off-farm activities. The nominal wage per day was considered for the analysis. Respondents reported differences in wages for men and women in vegetable and fruit nurseries as well as in farming and post-harvest operations. Women's employment and wage ranges in various horticulture activities are shown below (Table 5).

Table 5. Women's Participation and Compensation for Horticultural Work

Crop Production Activities	Extent of Women's Participation	Women's Wages
Preproduction phase (including land preparation and other preplanting activities such as sapling/seed collection, etc.)	Moderately high	Low Tk 60 to Tk 80 per day
Production phase (including transplantation, sowing, intercultural operations, and crop management)	Average	Low Tk 70 to Tk 80 per day
Post-harvest operation and marketing (including transport, threshing, processing, cleaning, storing, and marketing)	High; limited to homesteads	Moderately high Tk 70 to Tk 150 per day

The increase in vegetable and fruit cultivation has increased the demand for laborers, leading to higher wages for both male and female workers. The focus group participants mentioned that wages for daily laborers have doubled over the last five years. Participants noted that workers in the labor-intensive vegetable subsector are scarce in the rabi season, mainly due to easy access to microcredit extended by both government and nongovernment organizations. The shift away from farm work reflects the fact that both genders prefer business occupations rather than working as laborers.

Fruit farming requires relatively less labor than other crops, and labor is required primarily in early stages. The demand for wage laborers in this subsector is relatively less than in the vegetable subsector.

The services and facilities that employers provide in addition to wages are considered benefits. The respondents noted that female workers receive maternity leave without pay.

B3. Technological Advancement

A dearth of appropriate technology was noted in the horticulture sector.

B4. Unique Challenges for Female Entrepreneurs

The study identified few female entrepreneurs. In fact, the one interviewed was the head of the Women Entrepreneurs' Association.

Challenges to women becoming entrepreneurs include

- Socio-cultural constraints
- Constraints in some organizations' systems
- Insufficient capital and credit opportunities
- Lack of linkages with marketing facilities
- Few opportunities for skills development
- Limited information flow

B5. Possible PRICE Interventions

Area	Possible Mechanism for Implementation
Farm-level support	<ul style="list-style-type: none">• Development of fair practices . establish maternity leave and equitable wages• Create linkage with various GO agencies and NGOs for supporting them• Conduct training to encourage women to increase participation in the production process of poultry feed ingredients from horticulture/agriculture waste products• Provide training to increase women to increase involvement with compost processing• Conduct training for women to increase their involvement in harvesting, sorting, grading and processing part of horticulture• Encourage the whole household farming approach to involve more women in agriculture sector• Training and Skills Development
Entrepreneurship development program	<ul style="list-style-type: none">• Increase access to finance, information• Organize management, technical and financial training• Create linkage with various GO agencies and NGOs for supporting them in respect of credit supply and other issues• Train for marketing
Employee support program	<ul style="list-style-type: none">• Skills development program• Advocate for equitable employment benefits for women• Develop maternity leave benefit• Establish daycare centers for women
Linkage development	<ul style="list-style-type: none">• Identify actual areas of linkage development• Identify organizations needed for linkages• Organize programs for linkage development• Assist in developing linkages with different government, nongovernment, private-sector, enterprise, business sector, local, and external markets through export promotion bureau
Social awareness development program for women's involvement in horticulture	<ul style="list-style-type: none">• Determine the appropriate media and materials for proper awareness outreach program• Develop campaign implementation procedure• Encourage the enforcement of HACCP standards at seed units and processing companies• Create linkages with GO agencies and NGOs for implementing the communication programs

B6. Possible Indicators to Reflect Success in Gender Equity

Tentative indicators for the success in gender equity are:

- Number of women who participate in these ventures
- Number of women who accessed resources provided
- Number of women who received fair wages commensurate with their skills and abilities
- Women received training and skills development opportunities

Table 6. Key Gender Equity Project Partners

Sector	Organization	Expected Role
Public Sector	Department of Agricultural Extension	Extension messages and institution education can be obtained from the Department of Agricultural Extension.
	Ministry of Women and Children Affairs	Linkages with market facilities can be explored with Department of Agricultural Marketing (DAM). The Ministry of Women and Children Affairs has several projects to facilitate women advancement in all EH sectors. Their project resources can be harnessed to involve women in the horticulture sector.
	Bangladesh Rural Development Board	
	Local Government Engineering Department	The Bangladesh Rural Development Board has several rural development projects where extension messages can be helpful for women. In addition, women who join the board's informal groups can become an organized force for horticultural production, training and marketing, and other roles.
	Department of Youth Development	The Local Government Engineering Department has organized a number of growth centers in local government marketing centers that have earmarked women's shelters are earmarked. Women receive support in organizing programs for horticultural value chain development.
Voluntary Organizations	NGOs	The Department of Youth Development has a number of training and extension support programs that can be utilized.
		Address the involvement of women in horticulture. In fact, some NGOs have facilitated the role of female entrepreneurs in the horticultural sector in the past decade, but more work is needed. research into issues and prospects can form the foundation for the development of supportive measures.
Business Associations	Hortex Foundation	Create scope to developing linkages for female entrepreneurs

B7. Sector Conclusion

The Horticulture sector in Bangladesh has a lot of potential to expand domestically and internationally. Currently, women are not as involved as they could be and increasing their participation throughout the sector will lead to significant poverty alleviation. Lack of a skilled female workforce, lack of fair labor practices and social taboos and inhibit the proper employment and fair wages for women. Developing this sector through institutional, skills development and technical developments will help enhance working conditions of women as well as increase total agricultural output.

ANNEX A

SIGNIFICANT NODES IN VALUE CHAIN—SHRIMP SUBSECTOR

Table 7. Gender Inequities and Constraints

Issues	Fry Collection	Depot	Processing Industry	
			De-heading/Grading/De-penning/Deveining	Office Maintenance/Security/Packaging
Wages	Discriminatory payments by agents and depot owners <ul style="list-style-type: none"> Men receive Tk 350 per hundred Women receive Tk 300 per hundred 	<ul style="list-style-type: none"> Female participation is negligible Payment is on daily basis No fixed wages On average, women earn up to Tk 1,200 per month; males earn up to Tk 2,400 	<ul style="list-style-type: none"> No fixed salary No gender-based wage discrimination Low wages: Tk 2.50 per basket of shrimp processed or graded <p>Low wages:</p>	<ul style="list-style-type: none"> Wage discrimination exists Fixed salary On average, female workers receive Tk 2,200 and males receive Tk 2,500 per month
Conditions	<ul style="list-style-type: none"> Women make up the vast majority of fry collectors (90%) and a significant percentage of labor in shrimp industry (35%). Most female fry collectors are either abandoned or divorced. On average, the families of female fry collectors had slightly higher incomes than male counterparts engaged in this work, possibly because men have other sources of income Female fry collectors own gear averaging Tk 1,500 in value; men own gear worth men was Tk 2,000. Continuous work in knee-deep, brackish water leads to disease Female fry collectors tend to live in isolated communities and have minimal access to financial institutions or local 	<ul style="list-style-type: none"> Involved in cleaning of shrimp Temporary work status; no job security Wages vary seasonally Physical and sexual harassment No education Health hazards Common toilet for males and females Social status of workers is low Social mobility is restricted 	<ul style="list-style-type: none"> Of the all women working in shrimp value chain, 65% are engaged in processing plants Men and women receive equal pay Length of work day depends on the workload Temporary status, depending on the supply of shrimp; no job security Injuries to hands and fingers is common Health conditions related to long working hours in harsh conditions are common Unmarried female workers face problems in arranging marriages for themselves Mothers have difficulty arranging marriages for daughters Sexual and physical abuse and harassment by male workers, 	<ul style="list-style-type: none"> Temporary status; no job security Unmarried female workers face problems in arranging marriages for themselves Mothers have difficulty arranging marriages for daughters Sexual and physical abuse and harassment by male workers, officials, police, and outsiders are common Consensual sex- for income or pleasure- is not uncommon among young female workers No health support from employers, even for work-related injuries or illnesses; employers provide only first aid <p>Female workers often subjected to physical harassment for any mistakes they make</p>

Issues	Fry Collection	Depot	Processing Industry	
			De-heading/Grading/De-penning/Deveining	Office Maintenance/Security/Packaging
	<p>administration, whether formal or informal</p> <ul style="list-style-type: none"> • It is difficult for women to market their catch directly. • Physical and sexual abuse of female fry collectors by influential members of the community, including police, and outsiders is common. • Education and training are not commonly available. 		<p>officials, police, and outsiders are common</p> <ul style="list-style-type: none"> • Consensual sex- for income or pleasure- is not uncommon among young female workers • No health support form employers, even for work-related injuries or illnesses; employers provide only first aid • Female workers often subjected to physical harassment for any mistakes they make 	
Benefits	<ul style="list-style-type: none"> • Fry collectors have become a specialized group in Shrimp production • Male and Female have equal occupational status • Needs no significant capital investment • Shrimp fry collection as a profession provides thousands of vulnerable women a good earning source for livelihood 	<ul style="list-style-type: none"> • Source of income for poor women in the area 	<ul style="list-style-type: none"> • Source of income In modern processing plants accommodations are provided 	<ul style="list-style-type: none"> • More security for these workers than for others • Accommodations are available in certain plants

ANNEX B

SIGNIFICANT NODES IN VALUE CHAIN—LEATHER PROCESSING, FOOTWEAR, AND LEATHER PRODUCTS SUBSECTOR

Table 8. Gender Inequities and Constraints: Hazaribag Tannery Area

SI no.	Issues	Slaughterhouse	Raw Skins/Hides and Salting	Liming and De-Liming	Chrome Tanning and Finishing
1.1	Wage	Not found significant for this study	<ul style="list-style-type: none"> Only 0.5% of females do this work Wage differences reported by all respondents <ul style="list-style-type: none"> Women's wages Tk 50 to Tk 70 per day Men's wages Tk 100 to Tk 150 per day Female workers hired only on a temporary basis 	<ul style="list-style-type: none"> Only 0.7% of females do this work Wage differences reported by all respondents <ul style="list-style-type: none"> Women's wages Tk 50 to Tk 70 per day Men's wages Tk 100 to Tk 150 per day 	<ul style="list-style-type: none"> Only 10% of females do this work Wage differences reported by all respondents <ul style="list-style-type: none"> Women's wages Tk 50 to Tk 70 per day Men's wages Tk 100 to Tk 150 per day
1.2	Conditions		<ul style="list-style-type: none"> No separate toilets, rest rooms, or prayer rooms reported No children's daycare center No supply of pure drinking water Environment is hazardous Workers handle chemicals with bare hands Workers suffer from skin diseases, TB, jaundice, fever, kidney problems, etc. No benefits for temporary workers No procedures for attaining permanent status Social stigma No social security No health care services No maternity leave or weekly days off 		
1.3	Benefits		<ul style="list-style-type: none"> Only permanent workers receive gratuity, provident fund, medical care, rent, travel allowance, weekend holidays, and medical leave Only permanent workers can earn leave 		

ANNEX C

SIGNIFICANT NODES IN VALUE CHAIN—VEGETABLE, FRUIT, FLOWER, AND SPICE SUBSECTOR

Table 9. Gender Inequalities in the Vegetable Production Subsector

SI no.	Issues	Nursery	Farming	Marketing and Distribution	Processing
1	Wages	Wage difference reported by all respondents: <ul style="list-style-type: none"> • Women's wages Tk 60 to Tk 80 per day • Men's wages Tk 80 to Tk 150 per day • Women's experience is not reflected in their wages 	Wage difference reported by all respondents: <ul style="list-style-type: none"> • Women's wages Tk 60 to Tk 100 per day • Men's wages Tk 100 to Tk 150 per day • Women's experience is not reflected in their wages 	<ul style="list-style-type: none"> • Women are not usually engaged in marketing of farm products • Variance of wages is not easily separable 	Not found significant for this study
2	Conditions	<ul style="list-style-type: none"> • Gender-based discrimination is reduced • Women are employed in nursery farming • No separate toilets, rest rooms, or prayer rooms reported • No children's daycare centers exist in rural areas 	<ul style="list-style-type: none"> • Gender-based discrimination is reduced • No separate toilets, rest rooms, or prayer rooms reported • Women workers do not receive appointment letters 	<ul style="list-style-type: none"> • Fewer women are employed 	Not found significant for this study
3	Benefits	<ul style="list-style-type: none"> • Maternity leave is permitted • Women-friendly technology adopted • On-the-job training available • Experienced women have better opportunities 	<ul style="list-style-type: none"> • Maternity leave is permitted • Access to job training is offered 	<ul style="list-style-type: none"> • Maternity leave is permitted • Access to modern technology • Scope for better employment 	Not found significant for this study

Table 10. Gender Inequalities in the Fruit Production Subsector

SI no.	Issues	Nursery	Farming	Marketing and Distribution	Processing
1	Wage	<p>Wage difference reported by all respondents</p> <ul style="list-style-type: none"> • Women's wages Tk 60 to Tk 80 per day • Men's wages Tk 80 to Tk 100 per day 	<p>Wage difference reported by all respondents</p> <ul style="list-style-type: none"> • 25% of fruit gardens employ female laborers at the plantation stage 	<ul style="list-style-type: none"> • In general, women are not employed for marketing and distribution of fruits, although a few women work in retailing 	<p>Difference in wage rates</p> <ul style="list-style-type: none"> • 30% of employees are women • Women's wages Tk 60 to Tk 100 • Men's wages Tk 80 to Tk 150 • Women's experience is not reflected in their wages
2	Conditions	<ul style="list-style-type: none"> • Conditions in nurseries have improved • Working women and nursery owners are friendly 	<ul style="list-style-type: none"> • Women are employed in post-harvest activities • No training benefits for women 	<ul style="list-style-type: none"> • Fewer women employed • No separate toilets, rest rooms, or prayer rooms 	<ul style="list-style-type: none"> • Favorable environment is for female workers in fruit processing plants • No separate toilets, rest rooms, or prayer rooms
3	Benefits	<ul style="list-style-type: none"> • Working environment is hygienic • Maternity leave is allowed, without pay • High potential for female employment and entrepreneurship • Legal rights are ensured for the employed women 	<ul style="list-style-type: none"> • No training benefits for women 		<ul style="list-style-type: none"> • Over 32% of the workers in fruit processing plant are women • Opportunities for women are higher in food processing plants • Maternity leave is allowed • On-the-job training is available

Table 11. Gender Inequalities in the Flower Production Subsector

SI no.	Issues	Nursery	Farming	Marketing and Distribution	Processing
1	Wage	Wage difference reported by all respondents <ul style="list-style-type: none"> • Women's wages Tk 60 to Tk 80 per day • Men's wages Tk 70 to Tk 120 per day 	Wage difference between men and women reported <ul style="list-style-type: none"> • Women's wages Tk 60 to Tk 80 per day • Men's wages Tk 70 to Tk 120 per day 	<ul style="list-style-type: none"> • Fewer women employed in marketing and distribution • Wage difference reported 	Found significant for this study
2	Conditions	<ul style="list-style-type: none"> • Working environment is hygienic • No separate toilets, rest rooms, or prayer rooms for women • Relations between women workers and their employers is friendly • Marigolds cause infection of hands during harvesting 	<ul style="list-style-type: none"> • No attitudinal discrimination • Unfavorable environment prevailed in some flower fields • Marigolds cause infection of hands during harvesting 	<ul style="list-style-type: none"> • In general, women are not employed in marketing and distribution of flowers • No separate toilets, rest rooms, or prayer rooms for women • Farmers sell products directly to wholesalers 	Found significant for this study
3	Benefits	<ul style="list-style-type: none"> • Maternity leave is allowed without pay • Training facilities are available 	<ul style="list-style-type: none"> • Maternity leave is allowed without pay • Training facilities available • On job training available 	<ul style="list-style-type: none"> • Women employed in marketing and distribution of flowers in urban areas only 	Found significant for this study

Table 12. Gender Inequalities in the Spice Production Subsector

SI no.	Issues	Farming	Marketing and Distribution	Processing
1	Wage	Wage difference reported by all the respondents	In general, women are not employed for marketing and distribution of spices,	Differences in wage rates
2	Conditions	Women are employed mainly in post-harvest activities	<ul style="list-style-type: none"> • Insignificant number of women is employed • Generally, no separate toilets, rest rooms, or prayer rooms for women 	<ul style="list-style-type: none"> • Environment for female workers is somewhat favorable. • Separate toilets, rest rooms, and prayer rooms
3	Benefits	<ul style="list-style-type: none"> • No training for women • Working environment is hygienic • Maternity leave allowed, without pay • High potential for female employment and entrepreneurship • Legal rights are ensured for employed women 		<ul style="list-style-type: none"> • Opportunities for female laborers are higher in processing plants • Maternity leave is allowed • On-the-job training available